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商务英语写作系列丛书

Technical Communication

Sixth Edition

商务沟通与写作

(第6版)

Rebecca E. Burnett



北京大学出版社
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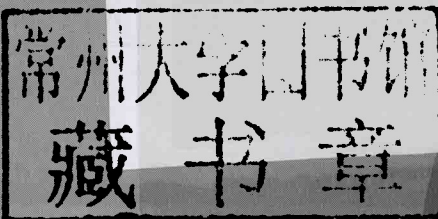
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Rebecca E. Burnett

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总序

北京大学出版社继《英语写作原版引印系列丛书》之后,2010年,又专题引进商务英语写作原版系列教材。这套教材体系完整,应用性强,商务内容丰富,十分贴近英语教学改革的需要和广大学生提升未来就业能力的需求,填补了我国商务英语写作领域内没有高质量商务英语写作教材的空白,并得到15所商务英语专业院校教学协作组和中国英语写作教学专业委员会相关专家的联合推荐。

随着我国对外开放的不断深入,高水平的商务英语写作人才一将难求,能用地道规范的英文起草法律合同、撰写咨询报告的专业写作人才更是凤毛麟角,部分国际咨询机构提供的一份英文公司咨询报告价格高达百万美元,如此激烈的竞争值得我们认真反思现有的写作教学。即将出台的高等学校商务英语专业本科教学要求(试行)明确指出,商务英语写作是学生的核心能力,商务英语专业应加大毕业设计的比重,鼓励学生采用商务报告(如市场调研报告、商业计划书、营销方案等)多种形式。而全面提升商务英语写作能力,按照过去传统的写作教学模式,已无法适应,必须要有新的改革思路,要改变“费时低效”的困境,就必须做到以下几个转变:(1)从重写作技能转向技能与内容并重;(2)从传统写作教学转向机辅写作教学模式;(3)从开设单一写作课转向开设写作课程群;(4)从大班课堂写作教学转向个性化写作教学中心。通过对美国普林斯顿大学、英国华威大学等世界名校的考察,我们建议,可分阶段分层次为不同水平的学生开设商务英语写作课程群(Writing Portfolio),具体可包括:基础英语写作、国际贸易写作、国际营销写作、金融英语写作、法律英语写作、学术英语写作、财经新闻写作、商务函电写作、商务报告写作、职业应用文写作等,全面提升学生的写作能力。

本套系列教材在国外畅销经久不衰,多次再版或重印,此次由北京大学出版社首批引进出版10本:《商务沟通:以读者为中心的方法》(上、下册)、《商务沟通与写作》(上、下册)、《最新商务报告写作》(上、下册)、《职场英语写作》(上、下册)、《成功商务英语写作》(上、下册),由对外经济贸易大学商务英语写作教学团队的教师魏明博士、冯海颖博士、杨颖莉博士、李玉霞博士、尹珏林博士分别撰写导读。

本套丛书既是职场英语写作的优质教材，又是商务写作的经典教材，教材深入浅出，语言简明，可帮助学生理解、记忆和应对多种国际商务场合下的写作需求。通过本丛书的学习和训练，学生可提高写作水平，为踏入职场做好准备。本套丛书可用作全国大专院校的商务英语学生和教师的写作课教材和参考书，还可供经管类学生学习商务英语写作之用，同时也可供爱好商务英语写作的广大社会读者和各类公司企业人员提高英语写作使用。

本套丛书主编为：李 明（《大学英语写作教程》主编）

本套丛书副主编为：李 明（《大学英语写作教程》主编）
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2010 年国庆节于北京

导 读

一、本书的特色

1. 作者简介

Rebecca Burnett 现为佐治亚理工学院教授。2007 年自依阿华州立大学退休, 曾任该大学修辞与专业交流高级教授, 获“杰出教师”之美誉。Burnett 为《商务与专业交流》杂志前主编。她同时在多家美国大型公司担任专家鉴定人与交流顾问等职。她的研究领域包括专业交流、团队合作、交流评估、跨文化交流和风险沟通等。

2. 本书特色

《商务沟通与写作》自 1986 年以来已再版五次。本书内容覆盖面广, 涉及从商务领域到学术领域各行各业的专业交流; 交流的形式也不仅限于文本, 而把口头报告、视图设计、网络交流也考虑在内; 不仅详细介绍了交流的过程与步骤, 还具体分析了职场常见的各种体裁。

作者提出评估专业交流的标准是可读性、可理解性与可用性, 并以此标准贯穿全书。此书自身其实就是可读性、可理解性与可用性的典范。全书设计精致, 插图丰富, 结构清晰; 有来自不同领域的新鲜实例, 示例文本有边际注解以鼓励读者批判性的评估; 每章有边栏讨论相关的一个职业道德问题; 本书还有配套网站, 每章附有众多网络链接, 学习者因而可以了解更多相关内容; 每章后的个体与协作任务也极具实用价值。

3. 使用对象与方法

鉴于其可读性和实用性, 无论是在校学生还是职场人士, 阅读此书都将获益匪浅。对于开设商务交流或高级写作的大学教师来说, 此书也是难得的好教材; 配套的教师专用网站可为教师提供丰富的教学资料。

二、本书内容

本书共有十六章, 分为四部分。

第一部分 职场中的交流

第一章 职场交流特点

定义了职场交流为各行各业之话语活动, 如撰写与制作专业文件、口头报告, 以及视图等。讨论了职场交流的重要性, 引导读者思考体裁、科技与职业道德在职场交流中的角色; 以具体的例证说明如何使职场交流更具可读性、更易懂、更可用, 以及影响交流的各种限制性因素。

第二章 理解文化与职场的关系

定义并解析了国家文化、机构文化以及身处文化中的个体。文化影响着工作场所的交流, 因此无论机构/公司采取全球化或本地化策略, 都应增强文化意识, 了解并尊重不同文化。

第三章 阅读技术信息

专业人士需阅读文件、聆听口头报告和观看视图文件来了解背景信息, 评估并做出决定, 学习并最

终完成某项任务。该章讨论了读与写之间的相互影响,以及有效的阅读策略。

第四章 满足交流对象需求

职场交流服务于两大目的:传递信息并说服读者/听众关注此项信息。因此了解读者/听众,分析他们的教育背景、工作经历、阅读能力、工作环境与职务都至关重要。该章讨论了如何针对读者/听众不同水平的专业技能调整材料的复杂度,针对他们不同的职务调整内容的选择。

第五章 职场中的合作

讨论了合作在职场中的重要性,合作中可能出现的问题,以及合作者应有的行为与技巧。良好的合作须避免情感(人际)冲突,协调潜在的程序冲突,鼓励关于实质问题的冲突。

第二部分 掌握信息筛选过程

第六章 搜集与使用信息

讨论了在交流前如何搜索与使用各类电子资源;如何采用其他手段如访谈、调查等收集资料;在采用信息资源的同时如何避免踏入剽窃的误区。

第七章 设计与起草

介绍了在交流前勘察、设计以及起草的技巧。勘察阶段可采用头脑风暴法、因果或综合分析法等技巧。设计阶段采用项目管理工具,思考所需交流的内容、目的、对象、结构和设计等因素,评估交流的内在逻辑。起草阶段则需考虑如何选择恰当的人称和动词语气,使用平实的语言,采用“已知—新信息”的组句结构等。

第八章 修改与编辑

修改侧重于整体,而编辑侧重于具体与局部。该章介绍了修改与编辑的过程、技巧以及需要注意的问题,并以一可行性报告为例分析了修改与编辑的重要性。

第九章 确保可用性

专业交流需确保可用性,即把使用者放在首位,满足不同目的与技巧的人们在各种复杂情境下的需求。该章介绍了三类可用性测试(基于文本的、基于专家的和基于使用者的),以及可用性测试的全过程(从建立可用性测试计划,到分析使用者与任务,到实施测试,到最后报告测试结果)。

第三部分 信息梳理

第十章 组织信息

介绍了如何利用大纲、故事板和表格来组织信息,如何利用主题句和过渡词/句来标志结构,如何利用六种传统结构形式——整体/部分、时间顺序、空间顺序、升/降序、比较/对比、因果——来展示信息。

第十一章 设计信息

为了有效地结合视图和文字来组织和展示信息以增加可读性、可理解性和可用性,该章介绍了一些利用页面空白、对齐方式、行间距和行长、标题、字体等来设计信息的技巧。

第十二章 使用视觉形式

介绍了各种视觉形式——图表、绘画、地图、照片等——在现代职场交流中的重要性及功能,并建议了如何正确、妥当地使用颜色。

第十三章 设计电子交流

基于网络的电子信息交流,是互动而非线性的,虚拟而开放的,复杂而动态的。为满足可读性和可

用性,该章介绍了设计网站所需要注意的几个因素:信息架构、网页设计和内容;具体讲解了如何组织、标识以及导航信息,如何设计界面,包括留白、滚屏、导航、颜色和图片,如何使内容更适应屏幕阅读的特点等。

第四部分 理解交流者采用的策略

第十四章 创建定义

在职场沟通中,情境化的定义是必不可少的。针对多变的词义及读者不同的理解能力,该章介绍了正式定义、非正式定义、归纳步骤的操作性定义以及扩充性定义。非正式定义包括同义、反义、否定、限定、类比、例释六类;而扩充性定义包括介绍词源、历史及举例。

第十五章 创建技术描述

技术描述概括物质特性,解答读者关于某一物体、物质、机制、有机组织、系统或位置的外观及组成的疑问。写一篇好的技术描述,我们需要了解读者的需求和目的,确定物质的结构和功能组成,选择精确而生动的措辞,设计直观而有效的视图,以空间顺序来安排说明文的结构。

第十六章 创建过程解释

过程解释不同于操作指南(后者见第二十一章);过程解释提供足够的信息让读者了解某一行为或过程,而非引导读者完成这一行为或过程。写过程解释,我们同样需要了解读者需求,确定具体步骤,使用各种视图(如流程图),选择恰当措辞(如根据具体情况选择主动或被动语态),以时间顺序来组织文章结构。

三、推荐相关参考书

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对外经济贸易大学

冯海颖

译者序

《商务沟通与写作（第6版）》的主要目的是帮助学生和在职人员面对各种读者（客户）需求时能进行有效的书面、口头和视觉上的信息交流。本书依据最新理论、研究和实践成果，用简明直白的语言解释了进行有效信息交流的方式和方法。设计精巧实用，提供了很多文本、数据和表格实例。本书设计的讨论和课堂练习可以帮助使用者成为更好的交流者。本书易读易教，强调创作有效书面和电子文档的过程是反复综合的过程，鼓励学生把创作和修改看成是不断发展的过程，把视觉方式看成是展现信息的手段，并重视语言在影响读者对信息内容评判中的重要作用。

本书使用者在进行信息交流的过程中将学会对修辞相关因素如语境、内容、目的、对象、组织、视觉手段及设计等的使用做出决断，并且了解做出各种交流方式决定的原因。本书不仅涉及信息交流中与修辞技巧相关的传统内容，即技巧（如定义、描述及过程）和形式（如信件、指南、提案和报告），而且详细描述了关于合作、职业道德、视觉手段及设计方面的内容以及扩展了国际交流、可用度测试和技术方面的讨论。与以前的版本相比，本书有以下变化：

- 增加了评估标准。第一章介绍了本书采用的可访性、理解性及可用性等标准来分析和评估书面、口头和视觉交流的效果。
- 增加了新例子。这些例子多与国际热点相关，如科技革新、药学发展、疾病控制、食品生产、生态平衡。
- 国际流行重点。许多国家的国际性企业的业务交流强调使用文本和视觉例子。
- 增加了关于文化的章节。第二章“理解文化与职场的关系”阐释了国际和企业文化及其对本企业员工的影响。
- 增加了关于可用性的章节。第九章“确保可用性”描述了可用性和可用性测试的特点，介绍了进行各种测试的指导原则，区分了可访性和可用性。
- 增加了关于技术的章节。技术内容贯穿全书。第十三章“设计电子交流”突出了各种新媒体的特点。
- 更多注释。本书样例配有更多的注释。
- 增加了职业道德注释栏。每个章节都有一个职业规范注释栏，讨论专业人士可能遇到的职业道德方面的冲突。
- 增加了网址链接。本书每个章节列举的网址可以通过本书的网址链接。这些网址提供了很多相关例子和文章，供进一步讨论。
- 增加了图片。本书新增图片阐释了工作中如何创作和使用技术文件、口头展示和视觉手段。

本书共分四部分十六章。第一部分包括五章，介绍了职场交流的主要内容。第二部分包括四章，讨论了信息筛选的主要过程。第三部分包括四章，讨论了如何整理收集到的信息。第四部分包括三章，讨论了交流者在信息交流准备中采用的策略。

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北京外国语大学英语学院

杨鲁新

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P R E F A C E

前 言

Technical Communication, Sixth Edition, has a clear goal: to help students and workplace professionals communicate technical information — written, oral, and visual — to audiences in a variety of complex workplace contexts.

Technical Communication, Sixth Edition, presents straightforward explanations and guidelines based on current theory, research, and practice. The elegant, usable design of this edition enables students to use many of the text's pages, figures, and tables as models. The discussions and the classroom-tested exercises and assignments, both individual and collaborative, help users become better communicators. This highly readable and teachable edition stresses the integrated, recursive nature of producing effective print and electronic documents, encouraging students to think of invention and revision as ongoing processes, to think of visuals as ways to present information, and to think of language as having the power to shape and influence users' perceptions.

What's the approach? This edition emphasizes a rhetorical, problem-solving approach. Users of this text will learn to make decisions about rhetorical elements such as context, content, purpose, audience, organization, visuals, and design as they engage in the process of communicating technical information. In addition, they will learn the *reasons* behind their communication decisions.

Users of this text — both traditional and nontraditional students as well as workplace professionals — will learn that effective technical communication contains both creativity and craft, a point I make by the continued use of Leonardo da Vinci's technical drawings on all the chapters openers throughout the book. Like Leonardo da Vinci's technical drawings, technical communication should be precise, detailed, functional, and focused. That's not all it should be; it's the least it should be.

Creativity and craft play out in another way with this edition's new cover featuring a photograph of wind turbines. The image is not only aesthetically pleasing, but it also represents the leading edge of a centuries' old technology that captures many of the challenges that technical professionals and technical communicators face. Traditions exist, but to endure they must adapt to a dramatically changing world.

Throughout the text, the traditional concerns of technical communication — techniques such as definitions, descriptions, and processes; and forms such as correspondence, instructions, proposals, and reports — are always related to rhetorical elements. Beyond these concerns, the text continues to include detailed

information about collaboration, ethics, visuals, and design and has significantly expanded its discussion of international communication, usability testing, and technology.

What's new in this edition? This sixth edition of *Technical Communication* maintains the strengths of the previous editions while incorporating important new information. The changes in this edition are drawn from current theory and research, leading-edge practices from the workplace, and helpful tools and strategies from practitioners. Twelve of the changes are particularly important:

- **Evaluation criteria.** Chapter 1 introduces easy-to-use evaluation criteria — *accessibility*, *comprehensibility*, and *usability* — which are used as a heuristic throughout the book to analyze and assess written, oral, and visual communication.
- **New examples.** New examples come from a variety of disciplines and professions. Many relate to global themes — scientific/technological innovation, medical advances/disease control, food production, and ecological/environmental balance — which demonstrate that scientific and technological concerns are global.
- **International emphasis.** The international workplace is emphasized with textual and visual examples from many countries and in many languages.
- **Special features.** Two-page spreads highlight interesting situations where technical documents, oral presentations, and visuals are created and used.
- **New chapter about culture.** Chapter 2, “Understanding Culture and the Workplace,” addresses international and organizational cultures as well as characteristics that influence individuals in those cultures.
- **New chapter about usability.** Chapter 9, “Ensuring Usability,” characterizes usability and usability testing, introduces guidelines for conducting various types of tests, and differentiates usability from accessibility.
- **New chapter about technology.** Throughout the new edition, you will find increased information about technology, including Chapter 13, “Designing Electronic Communication,” which highlights critical features of new media, ranging from e-mail and PowerPoint® to animated Web sites.
- **More annotations.** More extensive marginal annotations for the sample documents include questions and comments to encourage critical evaluation.
- **New Ethics Sidebars.** Each chapter includes an Ethics Sidebar that focuses on a complex ethical issue considered by workplace professionals. Several of these sidebars are new to this edition.
- **WEBLINKS.** Numerous WEBLINKS in each chapter are accessible through the book's Companion Web site, which also has a wide array of relevant examples and articles for discussion.

- *Photographs throughout.* New photographs throughout the text illustrate workplaces where technical documents, oral presentations, and visuals are created and used.
- *Improved design.* The sophisticated, usable design features full-color pages that demonstrate ways in which color can be functional and contribute to interpreting and using technical information.

What critical concerns are addressed? While accuracy is arguably the most critical aspect of any technical document, oral presentation, or visual, technical accuracy is not enough. This text balances theory and research, pedagogy and practice, and classroom and workplace needs. The balance is demonstrated in ten critical concerns:

- *Rhetorical base.* Most problems communicating technical information occur in complex workplace environments. In addressing this challenge, *Technical Communication*, Sixth Edition, uses rhetorical elements — for example, the context of the communication; the constraints of the situation; needs of the audience(s); purposes of the writers, speakers, and designers; conventions of the genres; strategies for organizing and designing information — which influence the process of creating documents, oral presentations, and visuals.
- *Communicating with audiences, including international audiences.* The text provides early and ongoing in-depth coverage of audience analysis, focusing on practical suggestions for evaluating audiences and developing strategies for adjusting material to different audiences, including those in a variety of international and organizational cultures.
- *Visuals and document design.* The text emphasizes the rhetorical nature of visuals and establishes parallels between visual and verbal information. The text also explores the role of color and emphasizes the impact of information design, both in print and electronic documents. The design of this text models ways to make information accessible, comprehensible, and usable.
- *Collaboration.* The text not only presents a chapter about collaboration, but the end of each chapter includes collaborative assignments. Throughout the text, students are reminded that the workplace is a collaborative environment and that written, oral, and visual information is seldom produced or used in isolation. Students not only learn the importance of collaboration and teamwork, but they also learn how to be productive collaborators.
- *Testing.* Creating effective documents, oral presentations, and visuals should include text-based, expert-based, and user-based testing. The results of testing can be used as the basis for revising and editing.
- *Process and product.* This edition shows how technical professionals are involved in a complex process to create as well as interpret technical

documents, presentations, and visuals. The text discusses ways to approach communication problems; explains options available to writers, speakers, and designers; offers suggestions about logical organization; and illustrates appropriate language use.

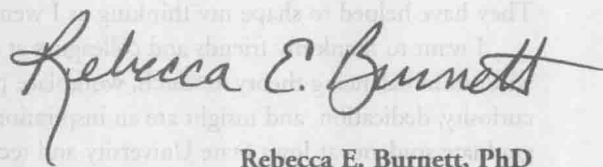
- **Technology.** Because technical communication takes place in a rapidly changing electronic environment, this text discusses the impact of technology on creating and interpreting documents, oral presentations, and visuals. Users learn ways to make informed decisions about technology as well as ways that enable them to take advantage of the power of new media.
- **Examples.** Throughout the text, annotated examples from students and workplace professionals around the world illustrate the key points and serve as models.
- **Style.** *Technical Communication* is a reader-based text; it directly addresses students and workplace professionals in a straightforward manner that is both appealing and accessible.
- **Apparatus and computer support.** The extensive marginal annotations prompt critical thinking and offer opportunities to discuss ideas and apply the practices presented in *Technical Communication*. The Individual and Collaborative Assignments at the end of each chapter encourage planning and developing a wide array of documents, oral presentations, and visuals.

What support materials are available? This new edition of *Technical Communication* has a greatly expanded *Instructor's Manual* and a Book Companion Web Site.

- The *Instructor's Manual (IM)* is a valuable resource both for highly experienced and for new instructors. It offers strategies for teaching each chapter successfully, including the use of a new convenient heuristic: RADAR (Read, Act, Discuss, Assess, and Reflect). The *IM* also includes suggestions for planning and preparing course material, additional activities and assignments, strategies for managing different classroom formats (traditional, computer lab, and online), PowerPoint® presentations for introducing or reviewing concepts, and tools and strategies for assessing student work (written, oral, and visual; individual and collaborative; print and electronic). In addition, the *IM* includes essays by nationally recognized researchers and educators; written specifically to accompany *Technical Communication*, Sixth Edition, these essays discuss innovative approaches and practices being used in technical communication classrooms. Many of the articles are new to this edition's manual. The *IM* is available free to all adopters of this new edition of *Technical Communication*. (You may request a copy of the *IM* from your Thomson representative or download the PDF version from the instructor side of the Book Companion Web Site, available at www.english.wadsworth.com/burnett6e.)

- *Student side of the Book Companion Web Site.* The student side of the Web site includes for each chapter an overview, tools and tips, “Workplace Realities” (videotapes with workplace professionals), annotated interactive examples, a variety of classroom and Internet activities, key terms, Web links to chapter-related content, and a tutorial quiz. Additionally, the student side of the Web site includes many cases, new assignments, a complete handbook, and career resources. To access the Book Companion Web Site, go to www.english.wadsworth.com/burnett6e.
- *Instructor side of the Book Companion Web Site.* The instructor side of the Web site includes for each chapter an instructor overview, chapter teaching tips, PowerPoint® lecture slides, and answers to chapter quizzes as well as suggestions for integrating the additional examples and assignments into the course. The instructor side of the Web site also includes course management tools, sample syllabi, rubrics for assessing student work, and suggestions for using the Web site’s cases and career resources. To access the Book Companion Web Site, go to www.english.wadsworth.com/burnett6e.

I have made changes in each edition based on the recommendations of colleagues from colleges, universities, agencies, businesses, and companies around the world. If you have suggestions about changes I should consider, please contact me. If you have examples that would work well for the next edition, please contact me as well. I value your feedback.



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